

Support Broker Opt Out

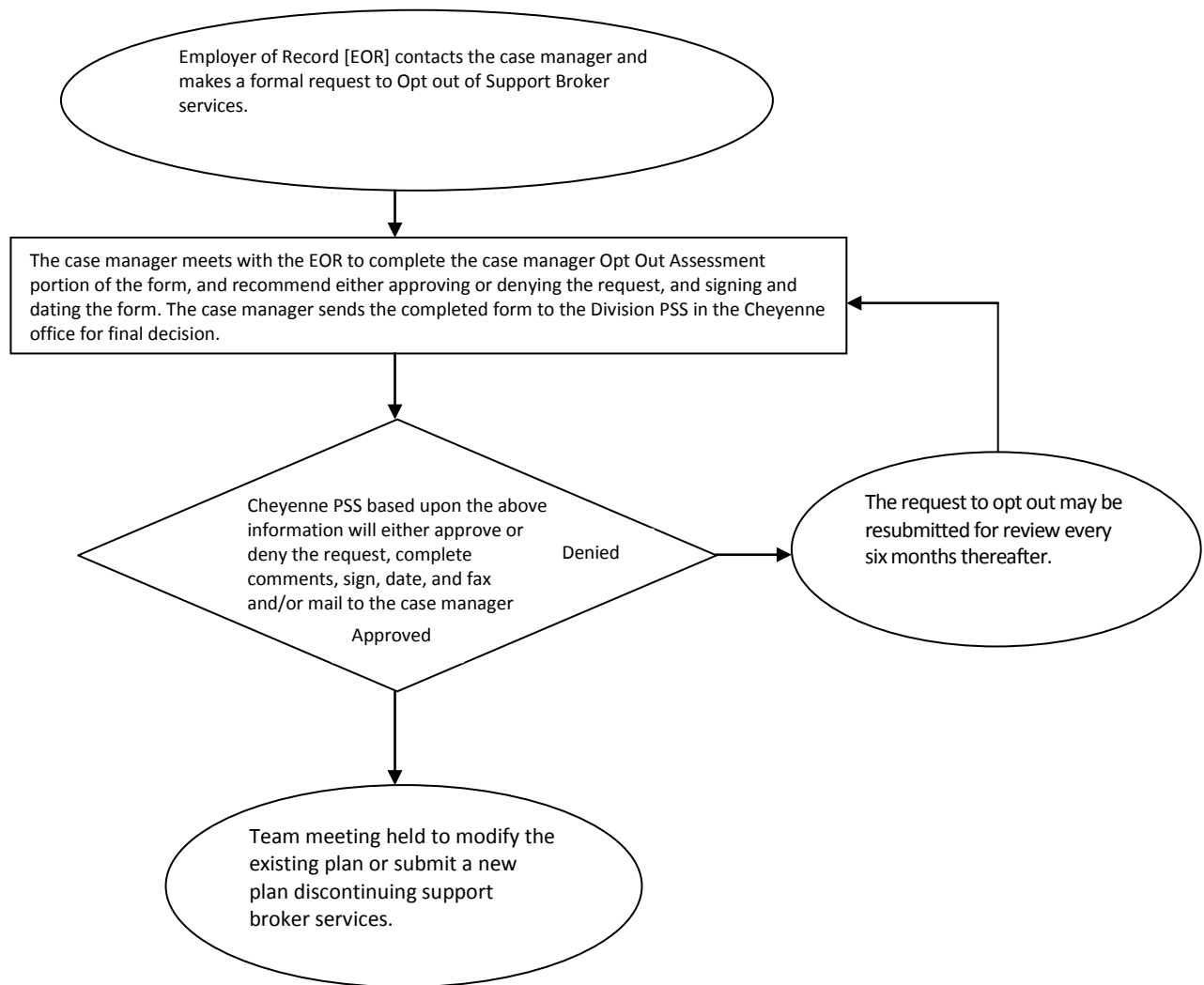
Process Flowchart

Process Owner: Rita Munoz

Developmental Disabilities Division

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1. Every Employer of Record [EOR] who wants to no longer utilize support broker services must go through the process.
2. EOR contacts the case manager and makes a formal request to opt out of support broker services. The EOR completes the applicable portion of the opt out form, signs, dates it, attains the support broker's signature and date, and then forwards it to the case manager. If the support broker has objections or concerns about the EOR's ability to opt out, then the team [case manager, EOR, and support broker] will meet to discuss concerns and develop a plan to help the EOR develop those skills. When both the EOR and support broker sign off then the form is forwarded to the case manager.
3. The case manager meets with the EOR to complete the case manager Opt Out Assessment portion of the form, and recommend either approving or denying the request, and signing and dating the form. The recommendation should be based upon review of support broker monthly documentation, appropriate service utilization as determined by the team, and if there are no concerns with the EOR that would prohibit their ability to work with the FMS. If the case manager has objections or concerns about the EOR's ability to opt out, then the team [case manager, EOR, and support broker] will meet to discuss concerns and develop a plan to help the EOR develop those skills. The case manager sends the completed form to the Division PSS in the Cheyenne office for final decision. The form should be completed in entirety meaning all signatures are attained prior to submitting to the Division.
4. Upon receipt of the Opt Out form, Cheyenne PSS will date stamp it and contact the field PSS staff for input. An email response from the field PSS will be attached to the form. If concerns are identified then the Cheyenne PSS can request copies of documentation, and review service utilization reports.
5. Cheyenne PSS based upon the above information will either approve or deny the request.
6. If the request is **approved**, the PSS completes the comment section, signs, dates, and faxes and/or mails it to the case manager. The case manager will hold a team meeting to modify the existing plan or submit a new plan without support broker services and decrease the IBA by that amount. Cheyenne PSS will contact FMS to close Plan of Care access for support broker. If needed, the case manager will decrease the allocated amount for the support broker through the PPL web portal. Cheyenne PSS decreases the IBA by the amount of support brokerage services.

If the request is **denied** the PSS completes the comment section, signs, dates, and faxes and/or mails it to the case manager. The case manager, and support broker will continue to work with the EOR to make improvements where needed. The EOR can make another request in six months.

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	Task	Dates
1	EOR contact the Case manager and makes a formal request to Opt Out of Support Broker services.	Date contacted
2	The EOR completes the applicable portion of the Opt out form, signs, dates it, attains the support broker's signature and date, and then forwards it to the Case manager.	Date sent
3	Case manager receives Support Broker Opt Out request	Date received
4	Case manager meets with the EOR to complete Case Manager Opt Out Assessment portion of the form along with recommendation to either approve or deny the request.	Date of meeting
5	If approved by the Case manager, the Cheyenne PSS receives the Support Broker Opt Out request for approval form and date stamps it.	Date received
6	Cheyenne PSS will contact Field PSS staff for input by email. Email response is to be attached to the form.	Date emailed
7	If concerns are identified then the Cheyenne PSS can request copies of documentation, and review service utilization reports.	Date requested
8	Cheyenne PSS based upon the above information will either approve or deny the request. <input type="checkbox"/> Approved <input type="checkbox"/> Denied	
9	If the request is approved : <ul style="list-style-type: none"> a. The Cheyenne PSS completes the comment section, signs, dates, and faxes and/or mails it to the Case manager. b. The case manager holds a team meeting to modify the existing plan or submit a new plan without support broker services and decrease the IBA by that amount. c. The Cheyenne PSS will contact PPL if appropriate. d. Case manager will decrease the allocated amount for the Support Broker through the PPL web portal. e. If needed the Case manager will decrease the allotted amount for the Support Broker through the PPL web portal. f. PSS decreases the IBA by the amount of support brokerage services and files the paperwork with the current IPC. 	Date completed _____ _____ _____ _____ _____
10	If the request is denied : <ul style="list-style-type: none"> a. PSS completes the comment section, signs, dates, and faxes and/or mails it to the Case manager. 	Date completed